

Add Forms and Schedules

08/14/2024 1:39 pm CDT

In order to work with any form or schedule, you must first add the form to the "5500 - Year" box. There are a few ways to get started:

- **Manual Entry.** Click on the appropriate form in the "Add Schedules" box. Once a form/schedule has been selected, it will appear under the "DRAFT-EDIT" column on the left-hand side of the screen. When you click on the form in the "Add Schedules" box, the system will first check whether you have entered copies of this form for any prior year. If so, it will copy the data for all of the schedules of the same type for the most recent year. If there are not any prior year schedules, the system will add a blank new schedule. You may also add schedules from the data entry screen for any other form or schedule (the options will appear along the left-hand side of the screen). In the data entry screen for any form, you can also move between different forms.
- **55Autofill.** Clicking on the 55Autofill link near the top-right of the screen will bring in DOL data from prior 5500 filings for the plan's EIN and plan Number. Caution - downloading DOL data will delete any 5500 data entered on the ftwilliam.com system for that year. After adding data via 55Autofill you will typically need to bring forward data from the year downloaded into your account.

Home > Edit Company > Edit Plan > 5500 > 2022 Help

Company:	Example Company	ID:	CustID
Plan:	Example Company	ID:	PlanID
Checklist:	Misc (1099, 5500 or Compliance)		
Details:	EIN: 86-7530932 • PN: 001 • PYE: 12-31		

Edit Status:	Unlocked
Signed Status:	Not Signed
Acceptance Status:	Not Submitted

5500 Menu

- SAR/AFN Print Settings [i](#)
- Batch/WorkFlow
- Upload and Download Center
- View 5500 FAQs
- **55Autofill**
- Bring forward 2021 data to 2022 for **this plan only**
- Bring forward 2021 portal users to 2022 for **this plan only** [i](#)
- Clone 2022 Return/Report within 2022 for **this plan only** [i](#)

Portal Menu

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NOTE: You may also batch import data for all of your plans with 55Autofill. You will need to provide us with a list of EINs and we can 55Autofill all of your forms and schedules at one time (all forms and schedules available for that EIN will be uploaded). If you only want certain plans, then we need the EIN and plan number. If you already have plans set up on ftwilliam.com and you want to add 5500s, let us know and we can batch 55Autofill for those plans as well. Contact us at support@ftwilliam.com for this service (no additional charge).

- **Bring forward (prior year) data to (current year) for this plan only.** This will bring forward 5500 information from the previous year to the extent possible (assuming the plan information is on the ftwilliam.com system in the prior year; in addition, some form and schedules may have changed from the previous year). All you will have to do is update any information that has changed. You can do this on a plan-by-plan basis, or you can batch bring forward data for all 5500 plans on the system (see [Bring forward \(prior year\) data to \(current year\) for all plans](#) below)(NOTE: the batch bring forward data option for all 5500 plans is only available for Designated Admins and the Master User on the account).

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- **Adding Pages to Schedules / Adding Additional Schedules.** Schedules C, D and G may require additional pages to be added. To do this, you can click on the name of the schedule under the "Add Schedules" box. The description of each new page will be "New". You may change the description at the top of the schedule by clicking on the schedule under the "DRAFT - EDIT" heading in the "5500 - Year" box. You will see the text "Enter a 5 character description New" at the top of the schedule/page. Hover your cursor over the word "New" and you will find it is a data entry field that can be modified. You may use any 5 character description to assist you in differentiating the multiple pages of a schedule.

Schedule A filings work a bit differently, as you may have multiple Schedule As and a particular Schedule A could have more than one page 2. To add a second schedule A, click on "Schedule A-New" within the "Add Schedules" box. To add an additional page 2 to a Schedule A, click on the link "p2" next to that form under the "DRAFT-EDIT" heading / Active schedules. You can give each schedule A, and each page of a schedule A, a different 5 character name as described above for other schedules.

5500 - 2022				Add Schedules
DRAFT-EDIT	STATUS	FINAL	DEL	Form 5500-EZ I
Form 5500 I	???	Form 5500	Del	Form 5500-SF I
Attachments		Attachments		Schedule A-New I
Schedule A-New I p2	???	Schedule A-New	Del	Schedule C-New I
Schedule A-New I p2	???	Schedule A-New	Del	Schedule D-New I
Schedule C-New I	???	Schedule C-New	Del	Schedule G-New I
Edit Check All 5500 Schedules Print All FINAL Schedules (Print Options) Print All DRAFT Schedules 5500 Review Summary				Schedule H I Schedule I I Schedule MB I Schedule R-New I Schedule SB I Annual Funding Notice I Summary Annual Report I Form 5558 I

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DRAFT-EDIT	STATUS	FINAL	DEL	Form 5500-EZ I
Form 5500 I	???	Form 5500	Del	Form 5500-SF I
Attachments		Attachments		Schedule A-New I
Schedule A-New I p2	???	Schedule A-New	Del	Schedule C-New I
Schedule A-New I	???		Del	Schedule D-New I
Schedule A-New I p2	???	Schedule A-New	Del	Schedule G-New I
Schedule C-New I	???	Schedule C-New	Del	Schedule H I
Schedule C-New I	???		Del	Schedule I I
Edit Check All 5500 Schedules Print All FINAL Schedules (Print Options) Print All DRAFT Schedules 5500 Review Summary				Schedule MB I Schedule R-New I Schedule SB I Annual Funding Notice I Summary Annual Report I Form 5558 I